

Important information about this form:

- Fill out this form to contribute money to an Alabama ABL account with a check.
- You may only contribute to an existing account. Use an **Enrollment Form** (or sign up online at www.AlabamaABLE.com) if you don't have an account.
- Include a check with the amount you'd like to add, and make it payable to Alabama ABL.
- There's a minimum contribution of at least \$5 per portfolio/fund and a yearly contribution limit of \$15,000.
- If you're making an ABL to Work contribution, you may contribute an amount equal to the Beneficiary's gross income, up to the current limit (see Program Disclosure Booklet for current limits), in addition to the yearly standard contribution limit.
- Type or print clearly in black ink, and do not staple the check.
- Future contributions and withdrawals will be allocated to help bring your account to your target allocation of cash and investment balances.
- Please note, once your funds have been allocated there is a 5-day hold period where you will not be able to withdraw these funds.

Need help?

Give us a call Monday – Friday
from 8am – 7pm CT at
1-833-711-2253

Individuals with speech or
hearing disabilities may dial **711**
to access Telecommunications
Relay Service (TRS) from a
telephone or TTY.

Mail the form to:

Alabama ABL
P.O. Box 9894
Providence, RI 02940-8094

Overnight Mail:

Alabama ABL
4400 Computer Drive
Westborough, MA 01581

1 ABL account information

Name of the Beneficiary on the ABL account (First and last)

____ _
Beneficiary's Social Security or Taxpayer Identification Number

____ _
Alabama ABL account number



2 Contribution type

Which type of contribution are you making (Please select one)

- ☐ Standard contribution
\$15,000 yearly standard contribution limit.
- ☐ ABLE to Work contribution
If the Beneficiary is earning wages, they may contribute an amount equal to their gross income, up to the current limit (see Program Disclosure Booklet for current limits) in addition to the yearly standard contribution limit.

3 Contribution information

There's a \$25 minimum contribution to open an account and you must contribute at least \$5 to each portfolio or fund you want to add money to.

Please read the **Alabama ABLE Program Description & Participation Agreement** for important information about the cash and investment options before making a decision.

Investment options

Conservative Portfolio \$ ____ , ____ . ____
Amount

Moderate Portfolio \$ ____ , ____ . ____
Amount

Aggressive Portfolio \$ ____ , ____ . ____
Amount

FDIC Savings Fund \$ ____ , ____ . ____
Amount

\$ ____ , ____ . ____
Total contribution amount

The investment information on this page has been provided by Sellwood Consulting, the investment advisor for the Alabama ABLE Savings Plan.



4 Sign the form — If applicable

Only sign if you're making an ALE to Work contribution.

By signing below, if I'm making an ALE to Work contribution, I certify that:

- The Beneficiary is earning wages.
- The amount being contributed is less than or equal to the Beneficiary's gross income this calendar year and is no more than the current limit (see Program Disclosure Booklet for current limits).
- The Beneficiary (or the Beneficiary's employer) has not contributed to a defined contribution plan (401K), annuity plan (403(b)), or deferred compensation plan (457(b)) this calendar year.

Signature of Beneficiary or Authorized Legal Representative

Date (mm/dd/yyyy)